

# ERISA 50<sup>th</sup> Symposium

September 12, 2024

## AGENDA

### **9:30 a.m. – 9:35 a.m. – Welcome and Short Introductory Remarks**

### **9:35 a.m. – 10:30 a.m. – Building on the Foundation of ERISA: Insights from Legislative & Regulatory Architects**

Join us for a compelling session that examines the origins and evolutions of ERISA. This distinguished panel will delve into ERISA 's legislative history and political milestones, sharing firsthand experiences and the pivotal moments that shaped this crucial law. Gain unique perspectives on the bipartisan efforts and policy decisions that continue to impact employee benefits today.

#### **Moderator:**

*Suzanne Woolley, Bloomberg News*

#### **Panelists:**

*The Honorable Max Baucus, Former Senator (D-MT) and US Ambassador*

*The Honorable Phyllis Borzi, Former Assistant Secretary, U.S. Department of Labor*

*The Honorable Preston Rutledge, Former Assistant Secretary, U.S. Department of Labor*

### **10:40 a.m. – 11:35 a.m. – Recent Political, Societal and Policy Changes Impacting ERISA and Employee Benefit Plans**

In an era of rapid change, the landscape of employee benefit plans, particularly those governed by ERISA (Employee Retirement Income Security Act), is being reshaped by a variety of political, societal, and policy shifts. This panel will delve into the latest developments influencing ERISA and employee benefits, with a specific focus on the modernization of healthcare and its implications for employer-sponsored plans. Join us for an engaging discussion that will explore how new political and societal trends are influencing the evolution of ERISA and employee benefit plans, and what it means for the future of healthcare access and coverage through employer plans.

#### **Moderator:**

*Megan Wilson, Health Care Influence Reporter*

#### **Panelists:**

*Chris Jennings, President, Jennings Policy Strategies*

*Jeanne Lambrew, Director of Health Care Reform, The Century Foundation*

*Avik Roy, President, Foundation for Research on Equal Opportunity*

**11:35 a.m. – 12:05 p.m. – Presentation of ERISA 50<sup>th</sup> Research Project**

**Moderator:**

*Barbara Marder, President & CEO, Employee Benefit Research Institute*

**Panelists:**

*Sudipto Banerjee, Ph.D., Director of Retirement Thought Leadership, T. Rowe Price*

*Ali Haffner, Associate General Counsel Senior – Employee Benefits & Executive Compensation, Elevance Health*

**12:05 p.m. – 1:30 p.m. – Lunch Break**

**1:30 p.m. – 2:25 p.m. – Adapting ERISA: Navigating Technological, Economic, and Workforce Changes**

Explore how technological advancements, economic policies, and workforce trends have shaped ERISA's role in ensuring retirement security and access to quality healthcare for Americans. This panel will discuss ERISA's adaptive responses to these dynamic influences, highlighting key reforms and innovations in the evolving landscape of employee benefits.

**Moderator:**

*Jean Chatzky, CEO & Co-Founder, HerMoney*

**Panelists:**

*Gopi Shah Goda, Senior Fellow at the Stanford Institute for Economic Policy Research*

*Brigitte Madrian, Dean and Marriott Distinguished Professor, Brigham Young University Marriott School of Business*

*Dallas Salisbury, President Emeritus, Retired CEO, Employee Benefit Research Institute*

**2:30 p.m. – 3:25 p.m. – The Future of Work: How ERISA's Evolution Can Support a Changing Workforce**

As the way we live and work continues to change, workplace protections that ensure a safe, healthy, financially secure workplace are vital for America's workforce. This panel will examine the potential elements that policymakers should consider in order to ensure ERISA continues to adapt to workplace dynamics. Consideration of potential challenges and opportunities for ERISA in adapting to future workforce dynamics.

**Moderator:**

*Karen Andres, Director of Impact Strategy and Partnerships, Aspen Institute*

**Panelists:**

*Joseph F. Coughlin, Director, MIT AgeLab*

*Richard Jackson, President & Founder, Global Aging Institute*

*Jennifer Yarrish, Director, Enterprise Strategy, AARP*

**3:30 p.m. – Closing Remarks**